Office of Information Technology Services

Enterprise Project Management Office

Project Closeout Process

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1 Document History

1) Revision History

Revision #	Revision Date	Description of Change	Author
1.0	12/09/2008	Initial Document	B. Swartz

2 Purpose

The purpose of this document is to record the process for closing Information Technology projects through the Enterprise Project Management Office (EPMO) using the Project Portfolio Management (PPM) tool.

3 Project Closeout

3.1 Introduction

Project closeout is the final phase in the State of North Carolina PPM Workflow. During this phase, the Project Manager submits the completed project data and the closeout documentation to the EPMO Quality Assurance (QA) team through the PPM tool. The QA team reviews the closeout information, and, if approved, moves the project to "Complete" status in the PPM tool.

3.2 Benefits

Benefits of the project closeout phase are listed below.
- Summarizes "Triple Constraints" data for the entire project.
- Documents "Lessons Learned" from the project.
- Moves the project to "Complete" status in the PPM tool.

3.3 Overview

The closeout process differs depending on the project range. The closeout process for projects >= $500,000 or projects that are part of a program is discussed in Section 4. The closeout process for Registered Projects ($100K – $499K) is discussed in Section 5.

4 Projects >= $500,000 or Projects that are Part of a Program

4.1 Overview

The Project Manager begins to close out the project at the conclusion of the Implementation phase and completes closeout during the Closeout phase. The final Status Report showing the Implementation phase 100% complete signals the QA team that the project will be moving to Closeout. The QA team assesses the project during Closeout Review.

4.2 Procedure

4.2.1 Implementation Phase
- Ensure that the following conditions are true:
    - The project is reported as 100% complete in the "Project" section of the "Schedule" tab.
    - All development phases (Initiation, Planning and Design, Execution and Build, and Implementation) are reported as 100% complete in the "Phases" section of the "Schedule" tab.

- All milestones and key project deliverables, reported in the "Milestone" section of the "Schedule" tab, have been achieved.
- All corrective action plans for issues and risks have been completed.
- All issues and risks in the "Issues and Risks" tab have been "closed".
- All development costs (actual dollars) have been reported in the "Cost Tracking" tab.
- The Operations and Maintenance phase projected dollar costs are reported in the "Cost Forecast" tab.
- All development hours (plan and actual) have been reported in the "Status" tab.
- Project "Scope" and performance to scope objectives is verified and validated in the "Status" tab.
- All information reported in the PPM Tool is current and correct. The following tabs cannot be updated after leaving the Implementation phase: Project Info, Budget Cost, Benefits, Strategic Impact, Risk Assessment, and Status.

  Note:

  If funds for final payment to a contractor must be held for several months, the final payment amount can be entered in the cost tracking tab for the implementation phase and the project moved to Closeout. No status reports will be required. The project will remain in Closeout until final payment is made, and any changes to the final payment will be documented in the cost tracking tab for the Closeout phase.
- Create/update the appropriate application in the agency's application portfolio, if required.
- When the final Status Report is approved, sign off to move project to Agency Approval. (All project contributors must sign off.)
- Agency Approvers sign off to move project to Closeout Phase.

4.2.2 Closeout Phase
- Meet with Project Management Advisor to discuss closeout and lessons learned.
- Review the Closeout tab of the PPM Tool Gate Checklist.
- Enter corrective action plan for any remaining open issues and risks.
- Enter closeout costs on cost tracking tab.
- Attach final versions of all documents to the Document Management tab.
- Complete Lessons Learned document and attach to the Document Management tab.
- Complete Project Closeout Review document and attach to the Document Management tab.
- Sign off to move project to Closeout review.

4.2.3 Closeout Review Phase
- EPMO QA reviews the Project Closeout Review and Lessons Learned documents.
- EPMO QA accepts the project closeout documentation and moves the project to "Complete" OR rejects the project closeout documentation and sends the project back to Closeout.
- If "Complete", project is closed.

- If sent back to Closeout, the Project Manager must correct errors and resubmit.

5 Registered Projects

5.1 Overview
The Project Manager begins to close out the project during the Registration phase and completes closeout during the Closeout Phase. The QA team assesses the project during Closeout Review.

5.2 Procedure

5.2.1 Registration Phase
- Enter Project Costs at level 4 on the Cost Tracking tab.
- Create/update the appropriate application in the agency's application portfolio, if required.
- Sign off to move project to Closeout.

5.2.2 Closeout Phase
- Complete Project Closeout Review (required) document and attach to the Document Management tab.
- Complete Lessons Learned (best practice) document and attach to the Document Management tab.
- Attach final versions of all documents to the Document Management tab.
- Sign off to move project to Closeout review.

5.2.3 Closeout Review Phase
- EPMO QA reviews the Project Closeout Review and Lessons Learned documents.
- EPMO QA accepts the project closeout documentation and moves the project to "Complete" OR rejects the project closeout documentation and sends the project back to Closeout.
- If sent back to Closeout, the Project Manager must correct errors and resubmit.

6 Contacts

To contact anyone on the EPMO staff, please see the EPMO Staff Directory:
http://www.epmo.scio.nc.gov/StaffDirectory.asp